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CC:	R.P. Eddy <rpeddy@ergo.net> Evan Pressman <epressman@ergo.net>
Date:	Sun, 3/2/2014 3:44:45 AM
Subject:	Follow up from Ergo Investment Partners Meeting this week

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Dear Prime Minister,

Thank you for spending time earlier this week to share your insights on our investment fund.

As you know, we believe predicting policy outcomes lead to investment opportunities, and few firms have the resources to do this as accurately as EIP. Your insights are invaluable in our investment process.

After some reflection, I wanted to suggest a way to collaborate on fund raising that might appear less “transactional” with investors and yet more effective in reaching our goals.

This process can simply be establishing relationships with people you feel would benefit from hearing and understanding our views on policy outcomes. No mention of anything else.

If over a series of meetings and updates they find they can trust our prognosis, it is very likely they will trust us with capital and they will inquire accordingly.

I also wanted to clarify one point I made regarding the use of software with data mining algorithms. We don’t use data mining algos (and never will) to make automatic computer generated buy/sell decisions. If it appeared I was advocating this style of investing, I should have communicated my views more clearly.

My reference was in hopes that you might keep us in mind if you hear of any Israeli firms (Israelis seem to be leaders in this technology) that appear to be developing a data mining software that looks like something special. While not great for trading, this type of software could dramatically increase EIP’s per capita profit and productivity.

Thank you again,

Ryan